What is Variable Personalization?

• It allows users to save the same filter criteria for reports that use the same Variable(s)
• Once filters are set, it pre-populates report filter criteria for that Variable(s)

Why would I want to use Variable Personalization?

• It can be a time saver if you ALWAYS want to view specific filter criteria everytime you run a specific report(s)
• For example FM010 Budget Availability and FM012 Transactional Detail - Site Admin use the same variables for Fiscal Year, Fund, and Program. Variable Personalization can help if you only want to view a specific Fiscal Year, Fund(s), or Program(s)
• It allows users to quickly personalize multiple reports (with the same variable) at the same time

What if I want to remove Variable Personalization? Is it an easy process?

• Yes. Removing Variable Personalization is easy. Click on Show Variable Personalization. Under Personalized Variables select the fields to be removed or use the double arrows to remove all fields.

Things to remember when using Variable Personalization

• When creating a Personalized Variable remember to check Show Personalized Variables. That way if you've created a Personalized Variable, affected reports will display a message, "One or more variables are personalized; click Show Variable Personalization link to display them."
• When in doubt, click on Show Variable Personalization to display Personalized Variables
Message displayed if 
Personalized Variables created
AND Show Personalized Variables checked

Click on Show Variable Personalization link to open Personalized Variables and add/remove filter criteria

To filter criteria to Personalized Variables, enter filter criteria, click on field (highlight), click on single down facing arrow. Or click on double down facing arrow to add all filter criteria.

To remove all Personalized Variables click on double up facing arrows. To remove specific Personalized Variables, click on field to select (highlight), click on up facing arrow.

Personalized Variables opens after you click on the Show Variable Personalization link